

Estate Planning Packages



octopuslegacy

“Excellent”

★ Trustpilot

Get expert estate planning support that grows with you.



Writing a will is a small but mighty act that makes life easier for the people you leave behind. But why stop there?

Octopus Legacy’s Estate Planning Package ensures your wishes are protected and gives the people you love a tailored plan that they will thank you for. One that stands the test of time and stretches beyond just the practical, to include the emotional mementos that are truly priceless.

	Prices	Classic Estate Planning Package	Premier Estate Planning Package
Price (Simple Will)		£1000 £1600 (for a couple)	£2250 £2900 (for a couple)
Price (Will with Trust)		£1250 £1900 (for a couple)	£2500 £3150 (for a couple)
Will	£150 (£200 for a couple)	✓	✓
Will with Trust	£399 (£699 for a couple)	✓	✓
Lasting Powers of Attorney	£499 (£899 for a couple)	✓	✓
Secure physical document storage		✓	✓
View your documents securely online		✓	✓
Unlimited will amends		✓	✓
Unlimited access to our storage service		✓	✓
Free will registration		✓	✓
Support for Executors		✓	✓
Discounts on any new wills		✓ (25% off)	✓ (50% off)
Discounts on probate services		✓ (5% off)	✓ (10% off)
Free estate plan review		✓ (every 3 years)	✓ (yearly)
Discounts on estate planning services for friends & family		✓ (10% off)	✓ (20% off)
A Legacy Box to hold your practical plans and emotional mementos		✓	✓
Record a Legacy Film			✓

Our Classic Estate Planning Package has an estimated value of at least **£2,500**

Our Premier Estate Planning Package has an estimated value of at least **£5,000**

Free will and lasting power of attorney

In both packages you will get a free will and free lasting power of attorney. The free will includes simple wills and wills with trusts so that we can cover your needs.

Unlimited will amends

Both packages include unlimited amends to your existing will, such as removing or adding to your beneficiaries or updating your details. The government recommends you update your will every 5 years, or any time you experience any of the following life changes, to make sure it still reflects your wishes:

- Getting married
- Getting divorced
- Having children or grandchildren
- Buying or selling a home
- If an Executor or Guardian is no longer able to act
- If your wishes change and evolve
- If there are changes to the law that change how effective your will is

Did you know?

The government recommends that you review your will every 5 years or any time you experience a major life change.

Updating a will can be costly and daunting. Our Lifetime Packages make it simple, helping you create an estate plan that stands the test of time.

As part of our Lifetime Packages, we will:

- Support you when reviewing your will, advising you when it needs to be updated.
- Give you access to unlimited updates to your will.
- Help you keep your will up to date, tax efficient and legally valid

Free estate plan reviews

Rest easy knowing that your documents will always be up to date. Our expert team will review your estate planning documents with you in a free estate planning consultation. We'll check that your documents are still up to date and let you know whether any changes need to be made. If you're on the Classic Package our experts will review your documents every three years. If you're on the Premier Package, experts will review them every year.

Secure storage for your documents

Your will is a chance to lay out your wishes for the things that matter most. Keeping it safe and secure is incredibly important. Copies of your will are not automatically legally valid and if your original will can't be found, or is damaged for any reason, it can increase costs, cause delays and can even be used to contest your will and wishes.

Physical document storage:

As a member of our Lifetime Packages, you can store your will and any other estate planning documents in our accredited will storage facilities.

They are:

- Fireproof
- Waterproof
- Secured with monitored intruder alarms, CCTV and access control measures

We won't just store your will, we will:

- Review your will to make sure it has been signed correctly
- Provide you with storage certificates
- Send you a printed copy of your will for reference
- Give you quick and easy access to your documents which can be delivered to you, typically within 2 business days.

Digital document storage:

We also provide secure digital storage of your key documents, so that even when they are safely stored away you can easily access copies of them to check information from the comfort of your own home.

Unlimited access to our storage, adding or retrieving documents

You will always be able to access your documents for free, including submitting new documents to our physical and digital document storage services.

Free will registration

We go above and beyond to make life easier for your executors when the time comes. In addition to providing storage certificates to your executors, detailing exactly where your will is stored, we also register your will with The National Will Register. This ensures your will is easy to locate, giving you peace of mind that your wishes will be carried out as intended.

Support for executors

Being an executor is an important role, but it's one that comes with a lot of work and significant responsibility and at an already overwhelming time.

We're here to provide support. Whether that's for you, acting as an executor for a friend or family member, and to make life easier for the executors you've chosen.

We will:

- **Provide a storage certificate** for your executors so they know where your will is stored
- **Share guides with information and tips** on steps your executors can take today to make life easier in the future
- **Offer two consultations with our probate specialists** to work out if probate is needed, answer any questions about the process and signpost to support. The same service is available to you if you ever need to act as an executor
- **Share a guide to the practical steps that need to happen after someone dies** – from verifying the death right through to finalising the estate

Share discounts on our services:

The Classic Package offers you 25% off any new wills and the people you love 10% of all estate planning services. It also offers 5% off Probate services when you act as an executor, and for the executors you've chosen as they carry out the wishes laid out in your will.

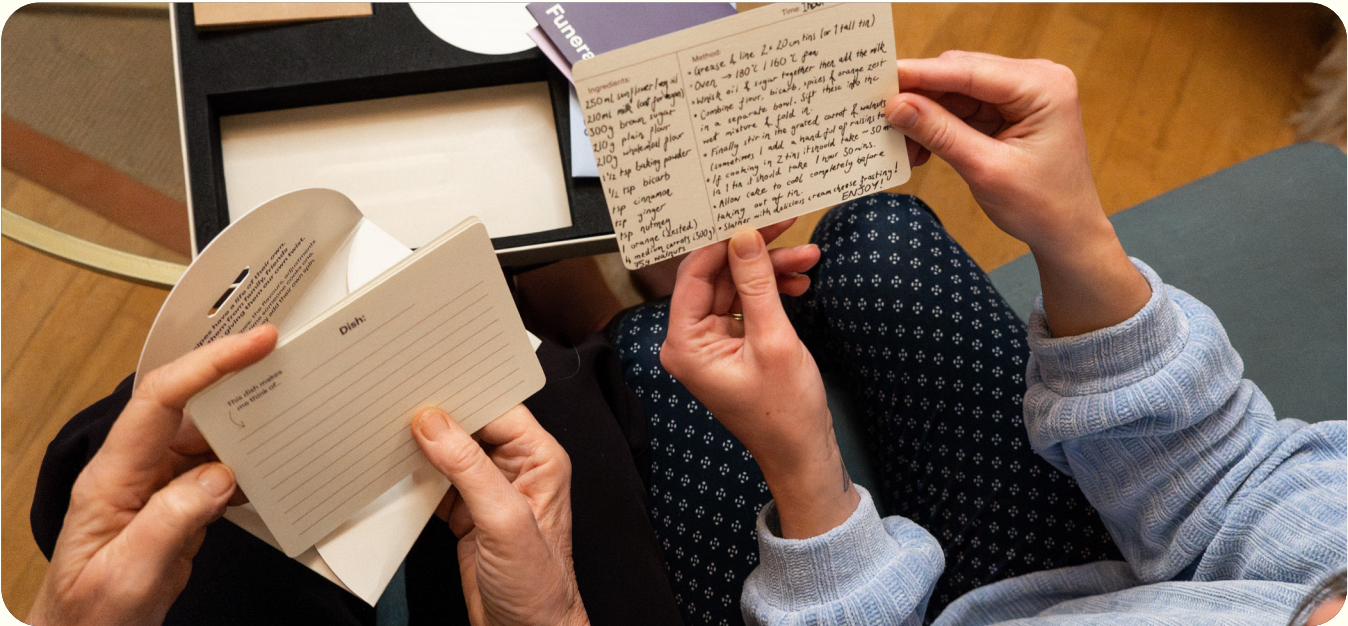
The Premier Lifetime Package offers you 50% off any new wills and 20% off all estate planning services for your friends and family. It also offers 10% off Probate services when you act as an executor, and for the executors you've chosen as they carry out the wishes laid out in your will.

Your Legacy Box:

This is the toolkit you'll leave behind to help the people you love take on life without you. From space to store your practical documents – such as copies of your will and storage certificate and a list of your accounts to the emotional mementos that keep you connected to the people you love even after you're gone – letters, advice, voice recordings and memories that will keep you connected to them long after you're gone.

Did you know?

The things that people missed the most about the people they love after they're gone were the sound of their voice, and their advice and wisdom.



Record a Legacy Film of you or a friend/ family member:

Have you ever worried that stories passed down from generation to generation might get lost? Our expert film crew will capture them and help you preserve them forever. We help you bottle the unique stories, messages or memories that will really be treasured. You can choose who features in the video – it could be you, or someone you love. From family tales to personal messages, leave no story left untold.

